

NOAA's Monterey Bay National Marine Sanctuary Visitor Center Site Feasibility Study

PHASE I REPORT
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Introduction

While the “Visitor Center” concept has been in existence for a number of years, the notion is new to the National Oceanic and Atmospheric Administration’s (NOAA) National Marine Sanctuary Program. The Sanctuary Program was originally established to protect sensitive marine areas, restore fragile ecosystems to their primitive condition and conserve submerged historical and cultural resources. Traditionally, Sanctuaries have provided educational activities to increase the public’s awareness of Sanctuaries and their mission. Over the past several years Sanctuaries have begun exploring opportunities to establish visitor interpretive centers to enhance and expand these programs.

In the Monterey Bay area of Central California, the nation’s largest National Marine Sanctuary is seeking to develop a Visitor Center that would increase the public’s awareness of the Sanctuary (and National Marine Sanctuary Program), its mission and its unique resources.

As envisioned by Sanctuary staff, the Visitor Center will utilize highly interactive interpretive elements to showcase the natural and cultural resources of the California coast from Marin County to Cambria. Additionally, the Center will introduce the concepts of National Marine Sanctuaries, citizen stewardship, ocean conservation and research to visitors, residents and school groups. The Visitor Center will also serve as a guidepost for tourists by providing information on local opportunities to explore and experience the Monterey Bay National Marine Sanctuary.

To assist with the planning of the proposed Visitor Center, the Monterey Bay National Marine Sanctuary (MBNMS) commissioned a team of experts lead by AMS Planning & Research to conduct a feasibility study for the proposed Center in June of 2002. The primary goal of the study is to provide objective analysis of the Visitor Center concept and provide Sanctuary staff with information on the opportunities and challenges associated with prospective sites. Sanctuary staff will use the feasibility study results to make an informed decision regarding the future development of the Visitor Center.

The study is being conducted in two phases as follows:

- Phase I (completed January 2003)
 - Review of NOAA planning efforts, masterplans, interpretive plans and facility assessments and relevant municipal and county general and specific plans on issues such as urban redevelopment, preservation, tourism, and recreation, and other relevant plans being developed by educational, business and regional agencies.
 - Interviews with a selection of key informants representing museums and attractions in area, the visitor industry, government agencies and others to generate information on community issues related to the proposed Visitor Center and solicit opinions of stakeholders related to issues and opportunities for the project.
 - Investigation of 23 potential sites within the Monterey Bay region identified by key informants and Sanctuary staff.
 - Research into partnering potential through personal interviews with local, state and federal agencies, non profit organizations, foundations, and owners of proposed sites, including discussions of joint use, shared use, co-development, operating relationships, cross marketing, etc.
 - A visitor intercept survey at three potential locations for the Visitor Center in the Cities of Monterey and Santa Cruz and at Seacliff State Beach. Over 900 surveys were completed over a three-day period in August 2002.
 - An analysis of market area demographics and lifestyle data.
 - Investigation of potentially competitive facilities in the Monterey Bay area.
 - An estimate of visitation to the proposed Visitor Center.
 - Comparative studies of 11 relevant visitor and interpretive facilities in selected U.S. markets.
- Phase II (commenced March 2003)
 - Geologic and geotechnical assessments of potential sites.
 - Environmental site assessments.
 - Cultural resources assessments.
 - Facility requirements.
 - Site compatibility evaluation.
 - Project cost estimate.
 - Evaluation of permit requirements.
 - A preliminary facility operating estimate including recommended staffing requirements and a base year budget for expenses and revenues.
 - An assessment of community and economic impact.

Background Research

Over 50 key informants from the Monterey Bay region were interviewed to determine their perceptions and attitudes toward, and potential support for, a new Monterey Bay National Marine Sanctuary (MBNMS) Visitor Center. These interviews explored awareness of and experience with the MBNMS, preference of location for a new Visitor Center and other site-related factors, programming suggestions, recommended features and levels of support for the project.

An initial list of key informants was generated by MBNMS staff and submitted to the consultants. As AMS consultants conducted interviews, the interviewees submitted additional names. Key informants included representatives from the cities of Santa Cruz and Monterey, California State Parks, local and regional planning departments, Convention and Visitor Bureaus, educators, neighborhood groups, MBNMS Advisory Council members and other area marine science institutions such as the Monterey Bay Aquarium and the Seymour Marine Discovery Center. All interviews were conducted on a confidential basis. (See Appendix I for list of persons interviewed.)

The following text summarizes themes and issues that emerged from these interviews.

Needs

Nearly all key informants agreed that there is a need for the Monterey Bay National Marine Sanctuary to develop its own Visitor Center to increase the public's awareness and understanding of the Sanctuary. However, a number of informants also stated that the area already has first-class "aquarium-like" attractions for visitors. The Monterey Bay Aquarium was the most cited, but informants also noted the recently opened Seymour Marine Discovery Center in Santa Cruz and numerous other marine environment interpretive programs.

Key informants indicated that the presence of these other institutions could pose challenges for the MBNMS in establishing unique interpretive programs and gaining higher public awareness of the Sanctuary and its mission. Informants consistently understood the need for a Sanctuary Visitor Center, but were unclear

about specifically what it should be and how it could complement existing institutions and attractions.

Community Contexts

Three possible general locations for the proposed Visitor Center are under consideration; each has its own unique environmental, social, political, and economic context. The following text summarizes the views of key informants of the sites and of planning documents and other reports that have been done. Detailed information regarding specific sites can be found in the *Site Evaluation* section of this report.

City of Santa Cruz

Elected officials and city staff interviewed for this study expressed enthusiastic support for an MBNMS Visitor Center to be located in the city of Santa Cruz. As of this writing, AMS has not been made aware of any opposition to an MBNMS Visitor Center in the City of Santa Cruz.

Community leaders from Santa Cruz County organized the Sanctuary Interagency Task Force in part to attract a Sanctuary Visitor Center and other Sanctuary activities to the Santa Cruz side of Monterey Bay. This pro-active group commissioned a study for a “Discovery/Visitor Center” in 1998, which recommended that Santa Cruz brand itself as the “Gateway to the National Marine Sanctuary.”

The City of Santa Cruz has been planning for several years to develop a City-owned parcel of land near the waterfront known as the Depot Site. City Council has approved a plan for a 35,000 square foot Museum of Natural History to be developed by the Santa Cruz Museum Association, a private non-profit organization. The Depot Site is to include a multi-modal transportation hub and athletic field. City Council has also approved use of a portion of this site adjacent to the Depot, called the Fun Spot, for an MBNMS Visitor Center. The City and the Museum Association (as well as Museum staff) have expressed a high level of interest in partnering with MBNMS to develop and operate a joint museum and Visitor Center. The proximity of the new Museum of Natural History to the Fun Spot site would be advantageous for developing a highly collaborative relationship with the Sanctuary Visitor Center.

The Seaside Company, operators of the Santa Cruz Beach Boardwalk amusement park, has expressed interest in working with the MBNMS to locate the Visitor Center in an existing building at the Boardwalk. Company officials are interested in a partnership arrangement that would be mutually beneficial. Over 3 million people visit the Beach Boardwalk annually and the view and access to the ocean are unparalleled.

Representatives from the University of California’s Seymour Marine Discovery Center at Long Marine Lab were also interviewed for this study. Interest was expressed in collaboration with the Sanctuary and locating the Visitor Center at the Long Marine Lab located on an oceanfront site on the west side of the city.

Seacliff State Beach

California State Parks has proposed locating an MBNMS Visitor Center at Seacliff State Beach in Aptos, off Highway 1, about 5 miles south of Santa Cruz. Residents and businesses surrounding Seacliff State Beach are very interested in this project and four groups have organized around strongly held opinions regarding a Visitor Center here.

Favoring the Visitor Center are the Seacliff Village Plan Association and the Aptos Chamber of Commerce, who view the project as a catalyst for improving the commercial zone of Seacliff village as proposed in the County-approved Seacliff Village Plan¹. These groups believe the key reasons for locating the Visitor Center at Seacliff are:

- Catalyst for implementation of the County approved Village Plan
- Beautify and improve State Park Drive, the access road to Seacliff
- Positive economic impact for local businesses
- Enhance Village and State Beach visitor parking
- Improve drainage and landscaping
- Encourage pedestrian traffic between State Beach and Village businesses

Two groups oppose the development of a Visitor Center — the Seacliff Neighbor's Coalition (organized specifically to oppose this project) and the Seacliff Improvement Association (SIA). While these groups generally support the mission of the MBNMS and agree in general with the need for a Visitor Center, they believe that a Visitor Center at Seacliff State Beach would negatively impact their neighborhood. In 2002, the Coalition circulated a petition and claims to have gathered 1,500 signatures of local residents opposed to a Visitor Center. AMS held several individual interviews and two group meetings with representatives of the Coalition. The following list summarizes their concerns and was developed during meetings the consultants held with member of the Neighbor's Coalition and the SIA board of directors:

- Increased numbers of buses, cars and RVs parking in residential areas
- Increased traffic congestion on State Park Drive
- Increased commotion and public activity on bluff-top area
- Preservation of community "open space"
- Preservation of ocean view
- Preservation of "community character"

State Park officials have expressed strong interest in partnering with the MBNMS in development of a Visitor Center. They, and others in the community,

¹ *Seacliff Village Plan*, Santa Cruz County Supervisors, 2001

believe that most of the negative impacts cited by the Neighbor's Coalition could be mitigated with proper planning and by locating the facility in the parking area and/or maintenance yard² on the bluff overlooking the Beach.

Both supporters and opponents tend to agree that utilizing the parking area and maintenance yard portion of the site for a Visitor Center would be preferred and that a sensitively designed building could be accommodated with minimal impact to views and open space.

It appears that a source of Seacliff residents' concerns is a result of inconsistent communication regarding the project. This has caused many in the community to distrust the proponents of the Visitor Center. Development on the bluff at Seacliff State Beach has a history of contentiousness; a more detailed dialog with the community earlier in the process (before commencement of this study) might have assuaged their concerns. If this site is selected for the Visitor Center, great efforts will have to be made to gain the trust of Seacliff residents and demonstrate to them that traffic and parking issues will be adequately addressed and that views and open space will be preserved.

For their part, opponents of the project have, so far, declined to consider efforts to negotiate alternatives that might resolve their concerns. Indeed, there are existing problems with parking and traffic that could be solved through careful planning and development. The bluff top currently is poorly maintained and is contaminated with many non-native plants. A well-planned Visitor Center could alleviate traffic congestion, improve parking and beautify the bluff top while preserving ocean views.

City of Monterey

Elected officials and city staff interviewed by AMS expressed support for a Visitor Center and interest in assisting with development. The City currently supports several museums and numerous historic sites, offering free space, services and financial aid. City officials indicated they would consider support for a Sanctuary Visitor Center in a similar manner.

Representatives from the Monterey County Convention and Visitors Bureau (CVB) expressed support for the project and discussed possible partnership arrangements including a shared, multi-agency Visitor Center that could be located at the main entrance to Fort Ord, about 5 miles north of the City of Monterey.

The City of Monterey is home to the Monterey Bay Aquarium, which draws nearly 2 million patrons per year. Nearly one-half of all visitors to Monterey tour the Aquarium. Many informants interviewed for this study expressed concern about potential duplication of services between the Aquarium and an MBNMS Visitor Center. The Aquarium's exhibits and programs interpret the region's oceans to visitors, school and adult groups and local residents, with an emphasis

² Site configuration options will be addressed in Phase II of this feasibility study.

on Monterey Bay. MBNMS staff and AMS consultants met with Aquarium representatives to explore the possibility of accommodating the Visitor Center within the Aquarium. These discussions revealed that the will to collaborate is present, but the square footage to do so is not.

AMS also interviewed community members opposed to further tourism development in Monterey who led the opposition to a Golf Museum, which was to be located in Monterey. These informants indicated to AMS that they would not oppose a MBNMS Visitor Center if it were co-located with an already existing attraction such as the Aquarium or the Maritime Museum.

Programming Opportunities

The following section describes some programming opportunities that will meet the objectives of the proposed MBNMS Visitor Center and respond to public input obtained from the interviews and the visitor intercept survey conducted in Monterey, Seacliff and Santa Cruz in August 2002. Programs fall into four general categories:

- Exhibits
- Public Programs
- School Programs
- Outreach Programs

Principles of Access

Visitors to the MBNMS Visitor Center will come with varied interests, abilities, and characteristics. Programs, to be effective, should be organized around some basic principles of access in response to visitors. The Visitor Center's programs must:

- Be understood and appreciated by persons with varying levels of experience with the marine environment and the National Marine Sanctuary.
- Involve large or small groups or individuals and promote meaningful interaction, learning, and enjoyment.
- Be understood and appreciated across cultural or language differences.
- Appeal to all ages and promote inter-generational interaction and communication.
- Be accessible to both genders.

- Involve persons with visual, hearing, or other physical limitations, or who are otherwise challenged.

Visitor Interests

AMS surveyed over 900 individuals at three locations in the Monterey Bay region in August of 2002. The locations were Monterey Cannery Row, Seacliff State Beach and the Santa Cruz Municipal Wharf and beach. Respondents were asked a series of questions regarding their background, experience with the area and their interests. Concepts for programs at a Visitor Center were also tested. (Complete survey results and a copy of the survey instrument can be found in the appendix section of this report.)

Preferred Focus

Respondents were asked about their “preferred focus” for a Visitor Center. When asked to select between a focus of a “guidepost to the area’s natural resources” or a focus of being “an education resource,” the majority of respondents at all three locations indicated their preference for a center serving as an “educational resource.” Accordingly, the Visitor Center should consider placing most resources on developing a quality interpretive experience with somewhat less emphasis on providing information on available activities in the area.

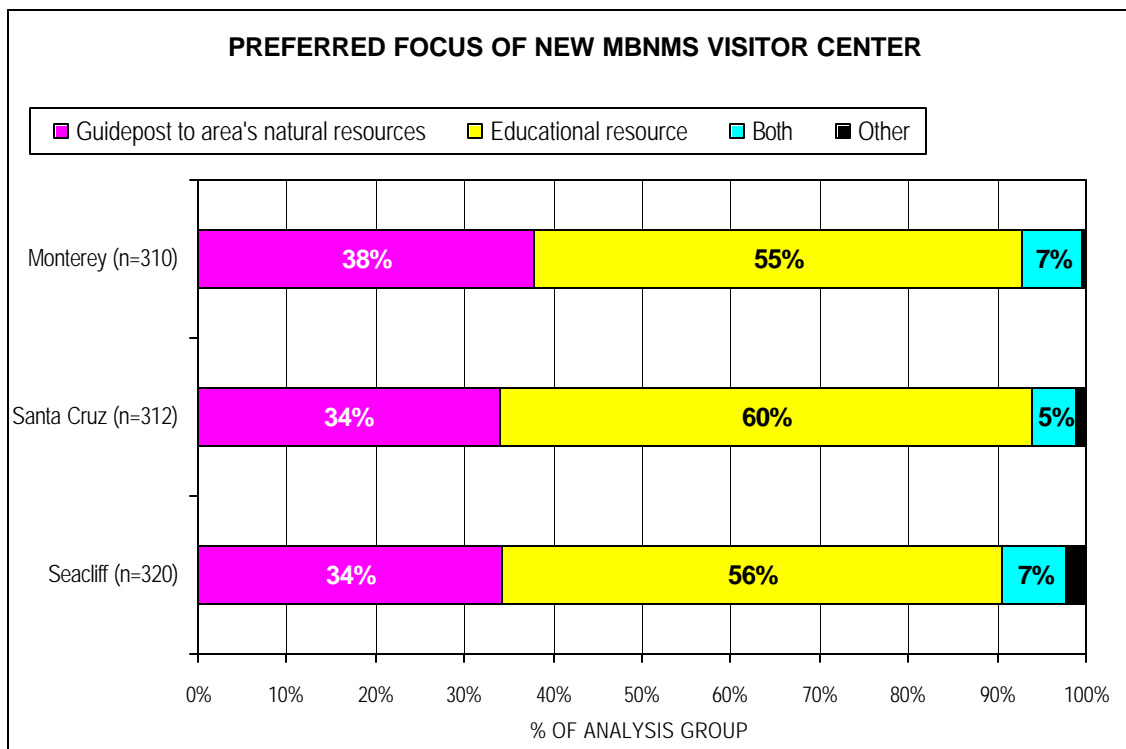


Figure 1: Focus of Visitor Center

Interest in Aspects of the Marine Environment

The survey data indicate that prospective Visitor Center attendees are highly interested in marine wildlife, underwater topography and the natural history of the Monterey Bay. There is also above average interest in Shipwrecks and Marine Conservation.

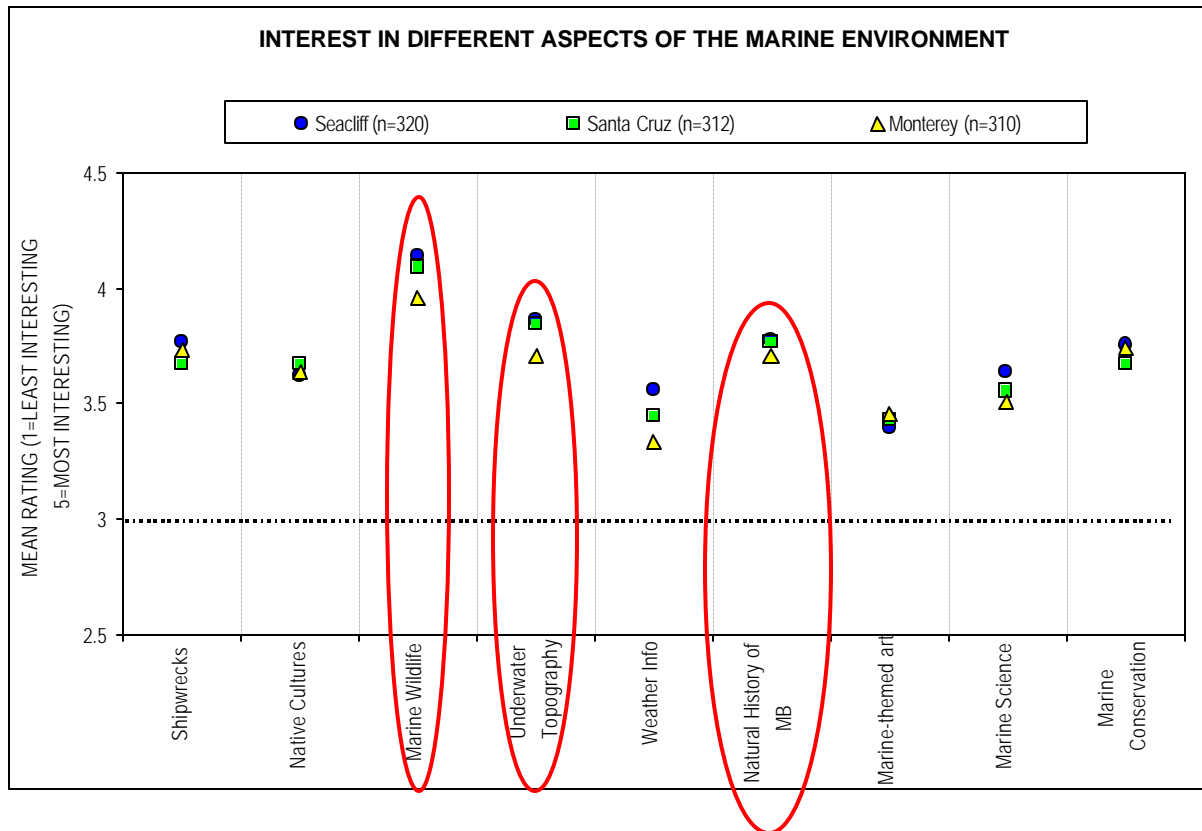


Figure 2: Interest in Aspects of the Marine Environment

The survey data were also analyzed by sub-analysis groups (in addition to comparing results from the three survey locations). The sub-analysis groups are: households with children versus households without children, “locals” (living in the Monterey Bay area), and visitors (living outside the Monterey Bay area).

The sub-analysis group data indicates that “locals” have a slightly higher level of interest in the aspects of the marine environment relative to other sub-groups.

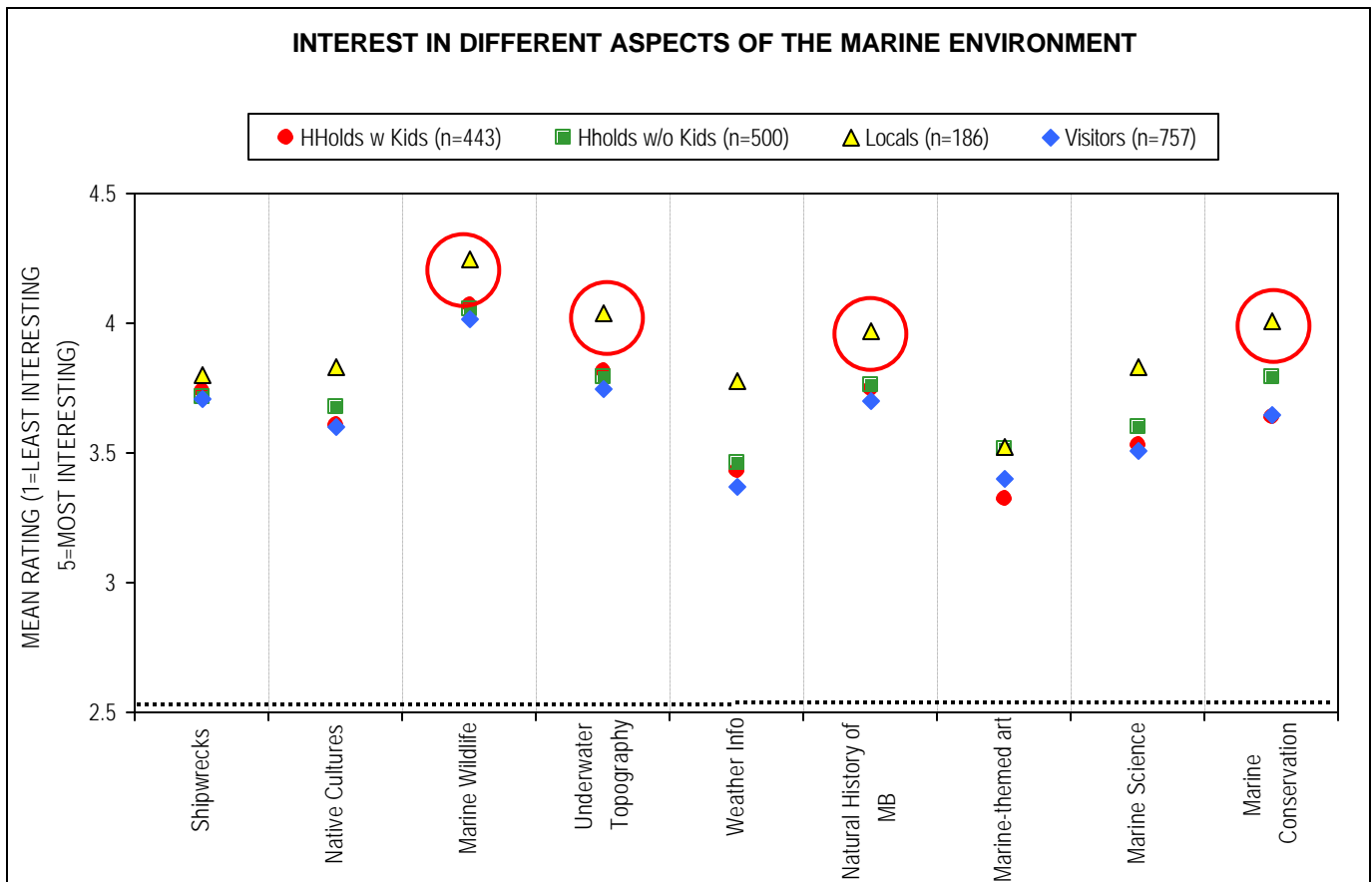


Figure 3: Interest in Aspects by Sub-Analysis Groups

Interest in Activity Types

Survey respondents were also asked about specific activity preferences, which ranged from “hands-on activities” to “kayaking with a Sanctuary expert” to “watching a film or video.”

The highest level of interest is for “hands-on activities.” This is particularly true for respondents with children living at home (see Figure 5). Santa Cruz respondents were also highly interested in “kayaking with a Sanctuary expert,” which was somewhat less interesting to Monterey and Seacliff respondents. Respondents in all three locations indicated high interest in “exhibits about marine wildlife.”

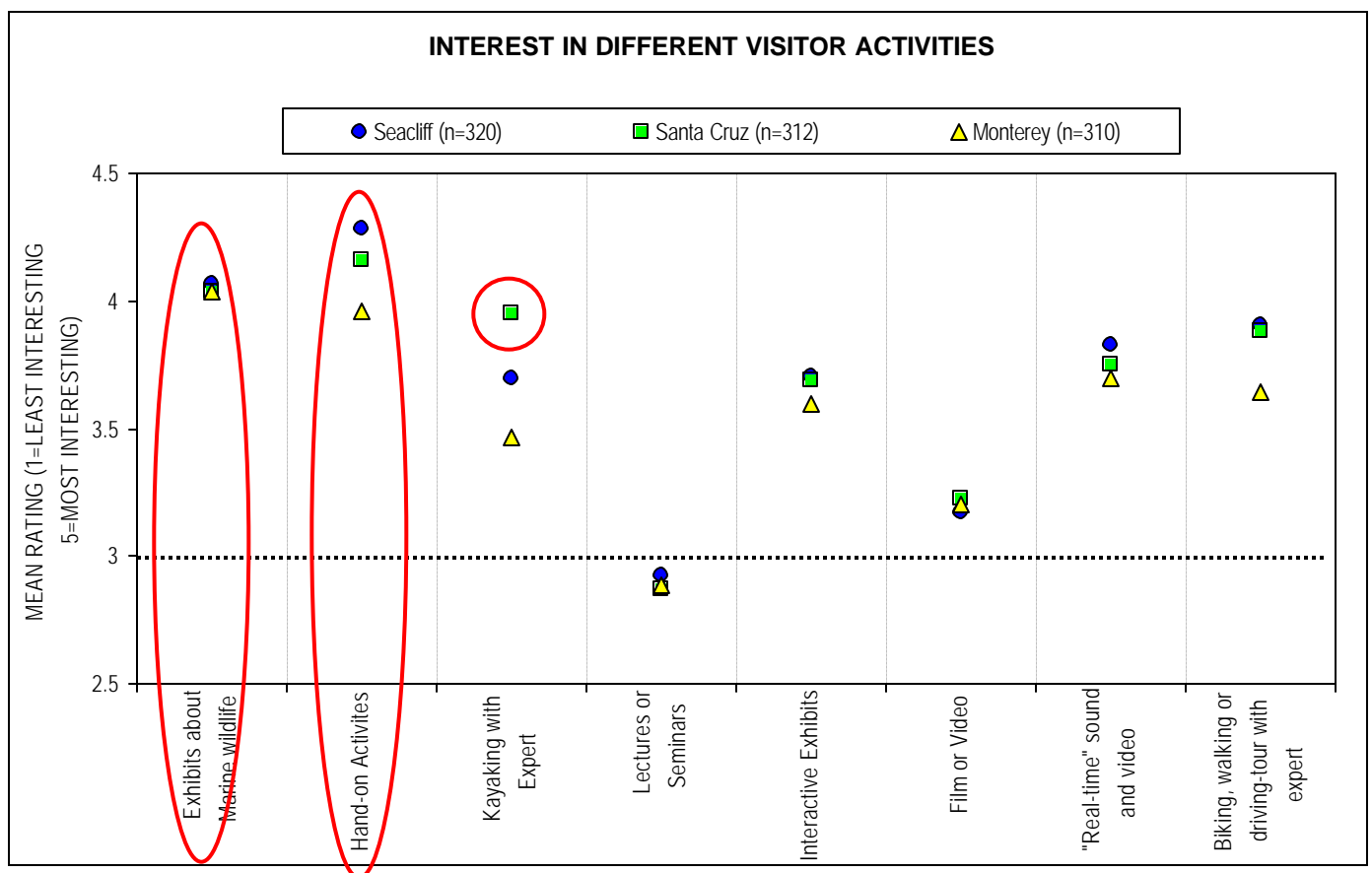


Figure 4: Interest in Activities by Survey Location

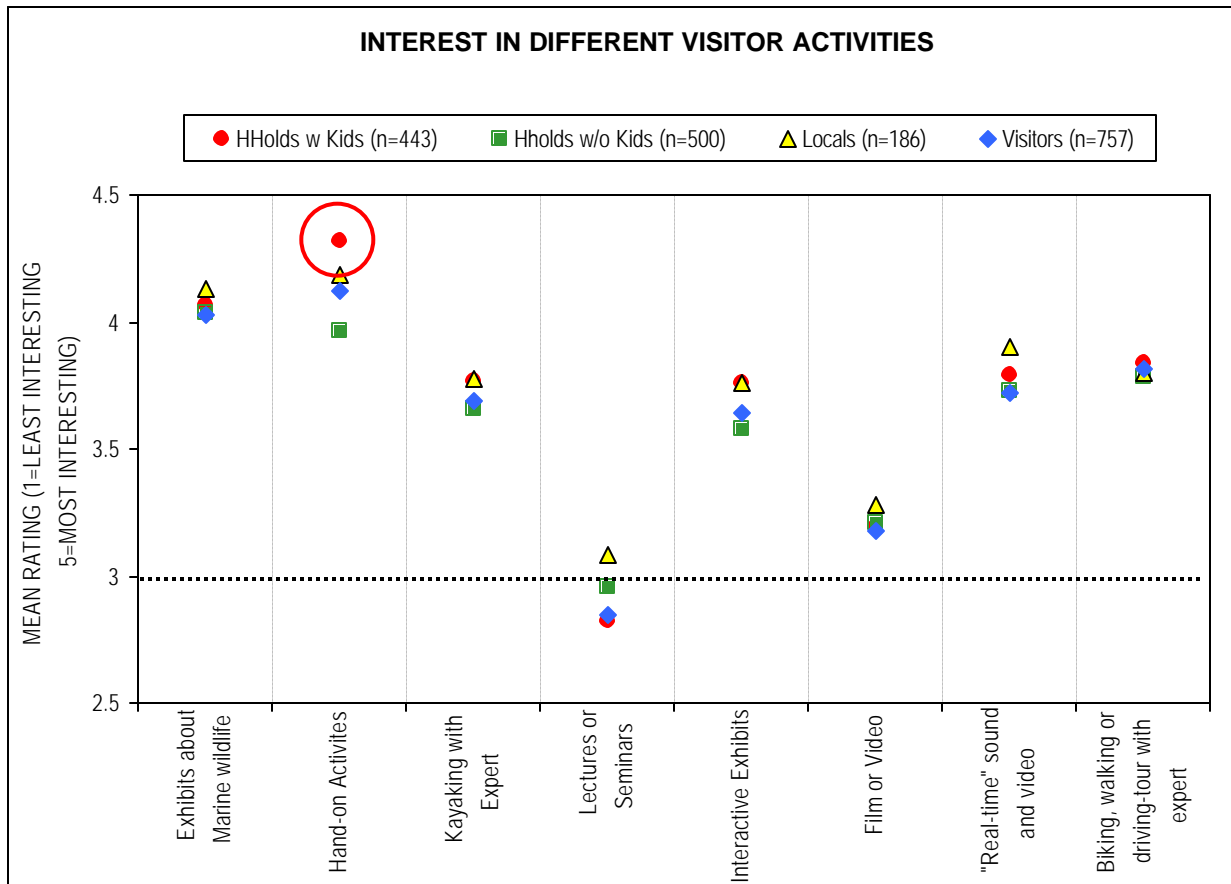


Figure 5: Interest in Activities by Sub-Analysis Groups

Exhibits

Exhibits will be the primary form of communication with the majority of visitors and MBNMS's mission, themes and messages will be transmitted through exhibits that will address specific topics. As detailed interpretive planning is undertaken, the primary themes can be further articulated as sub-themes, explored through various topics, each of which could be the subject of stand-alone or integrated exhibits.

Exhibits will be based on solid research and may include artifacts, photographs, and/or other material objects, and can be permanent, semi-permanent (i.e., long-term), or temporary. The exhibit experience must allow for both organized and self-directed viewing and for both casual and intensive contemplation. Successful exhibits that transmit primary themes are:

- High-quality
- Interactive
- Visually exciting
- Cost-effective

Exhibit Opportunities

- Film/video experience that introduces visitors to the National Marine Sanctuaries.
- Object-oriented exhibits using a mix of objects, text, photos, and/or models to explore approved topics.
- Interactive media exhibits allowing visitors to connect with and make choices about what they will learn and experience. Examples might be interacting with NOAA researchers through recorded audio or visual messages, planning an expedition to the Davidson Seamount using computer-based maps of Monterey Bay, or exploring kelp forests using computer-based simulations.
- Temporary exhibit space for the presentation of traveling or temporary Marine Sanctuary and ocean-related exhibits covering a wide range of themes, topics, and media.
- Hands-on spaces where visitors can handle equipment and role-play a marine scientist or commercial fisherman.
- Real-time audio/video links from research vessels or fishing boats and live feeds from cameras placed in and around the Monterey Bay.

Public Programs

The programming options outlined below have been organized around the overall goal of giving the public the opportunity to explore and experience the marine environment and activities, including recreation and scientific activities. This goal is expanded upon in a series of programming objectives.

Objectives

- To allow visitors to engage with the idea of marine conservation and the mission of the National Marine Sanctuaries.
- To provide visitors with the opportunity to observe and participate in activities that help to experience and understand the marine environment, and to develop an environmental ethic.
- To provide visitors with the opportunity to observe and participate in activities that help to understand marine research and commerce.

Public Program Opportunities

- Workshop series, with experts covering topics such as water safety, ocean stewardship, sustainable commerce, photography, etc.
- Lectures, talks, slide-shows, and book-launches by marine scientists, and other experts dealing with a variety of topics ranging from local conservation issues to resource management.
- Special events or festivals in partnership with other area organizations

- Field trips and field experiences such as beach walks, kayak tours and boat trips with Sanctuary staff or local experts

School Programs

Programs specifically aimed at schools and other youth groups, such as after-school groups, Scouts, and summer camps are a more specialized extension of public programs. As an educational institution, the MBNMS Visitor Center will have the opportunity to enhance the marine education of children from Santa Cruz and Monterey Counties and beyond. Programs targeted to schools will need to take care to comply with California State and National educational curriculum standards.

The MBNMS's school programming has the potential to enrich many aspects of the state curriculum, including history, geography, technology, science, art, environmental studies, physical education, and leadership.

In order to meet the needs of the school market, the Sanctuary will have to provide high quality, low-cost, interactive programs, which are tailored to curriculum guidelines. During detailed planning, the Visitor Center's staff must work closely with local school boards to ensure that schools' programs meet the education requirements and standards necessary to make the proposed Visitor Center an attractive field-trip destination for teachers, and to ensure enjoyable and educational experiences for children.

Program Examples

- Field trips to the Visitor Center, which could include marine research programs, tidepool or beach hikes, conservation projects and recreation.
- School visits by MBNMS staff to present programs related to marine science, ecology, conservation, etc.
- School kits and trunks containing objects and learning materials for loan to teachers for school-based activities, either as a prelude to, or replacement for, a field trip.
- Curriculum materials for use by teachers in the school. These materials could be print or web-based and would include modules that integrate with the state curriculum.

Outreach Programming

Outreach programs refer to activities that extend the institution beyond its walls. They are often an effective and practical alternative to a visit to the institution, particularly for school groups unable to afford a field trip to the Monterey Bay area and elderly and physically disabled people, who may not be able to travel easily to the center.

Outreach programs can play an important role in overall programming because they can begin before construction of the Visitor Center, and also serve to create awareness of the facility and support for it in the larger community. Outreach

programs provide an excellent opportunity for the MBNMS to collaborate with many groups and organizations within the community, including youth clubs, recreation clubs, community centers, libraries, parks, retail establishments, hospitals, daycare centers, and seniors homes. The MBNMS already conducts a number of outreach activities in the area and would likely expand this effort as a result of the Visitor Center.

***Outreach Program
Opportunities***

- Circulation of traveling exhibits created or hosted by the MBNMS, particularly in urban areas during the Visitor Center's slower season.
- Distribution of teaching kits and learning materials for use in community centers, libraries, retail establishments, and assisted living communities, which cover a variety of themes related to the marine environment.
- Special lectures, slide shows, video presentations, or demonstrations conducted by MBNMS staff, volunteers, or guest speakers at alternate locations.
- Production and distribution of books, pamphlets, films, videos, and web-based media for sale and distribution.
- Virtual field trips or Visitor Center experiences utilizing web-based technology or DVD/CD-ROMs.

Visitation Estimate

AMS has developed an estimate of potential visitation for the proposed MBNMS Visitor Center based on information obtained from the following sources:

- Visitor intercept survey conducted in August 2002
- Market demographics and lifestyles
- Analysis of attendance at comparable facilities.

Key findings from each source are discussed below.

Visitor Intercept Survey Findings

The visitor intercept survey found a high level of interest at all locations and across the sub-analysis groups of area visitors, Monterey Bay area residents, households with children and households without children. Figure 6 shows that over 90% of respondents at each location indicated a likelihood of attending an MBNMS Visitor Center. Comparing “very likely” responses in Figure 7 shows slightly stronger interest from “locals”³ and households with children.

³ “Locals” refers to respondents with home zip codes in Santa Cruz and Monterey Counties.

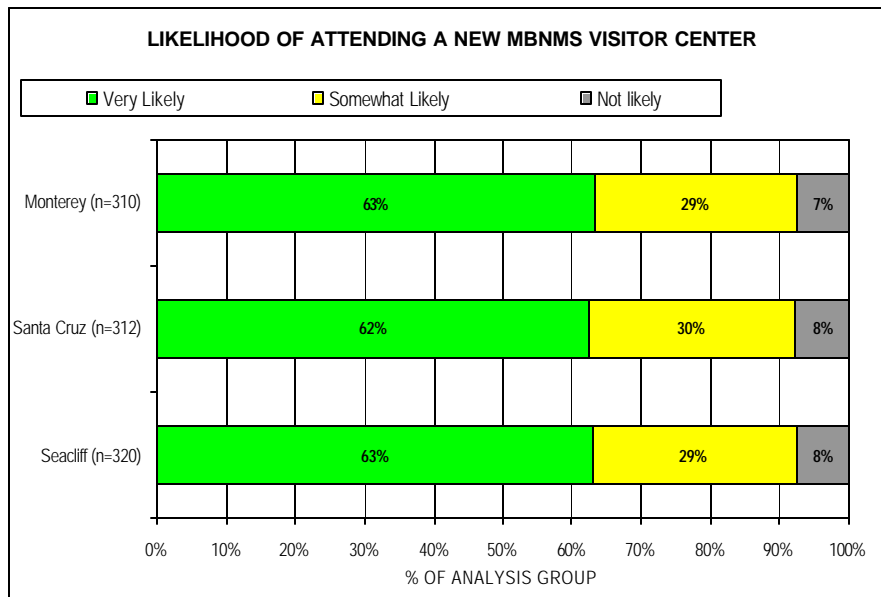


Figure 6: Likelihood of Attending by Survey Location

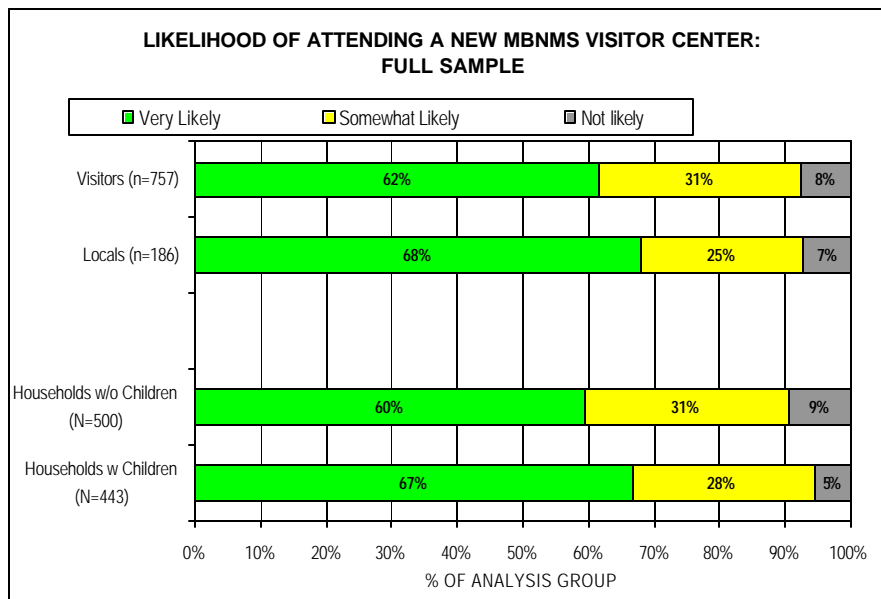


Figure 7: Likelihood of Attending by Analysis Group

To further evaluate interest in an MBNMS Visitor Center, respondents were asked to rate their interest in comparison to other area attractions. Even when compared to other area attractions such as the Monterey Bay Aquarium and the Santa Cruz Beach Boardwalk, respondents indicated a high level of interest in the

proposed Visitor Center. Monterey respondents rank their interest in the Visitor Center at the same level as the Aquarium. The interest level among Santa Cruz respondents was slightly higher for the Visitor Center compared to the Beach Boardwalk. Seacliff State Beach respondents indicated a substantially higher level of interest in attending a Visitor Center than the Boardwalk.

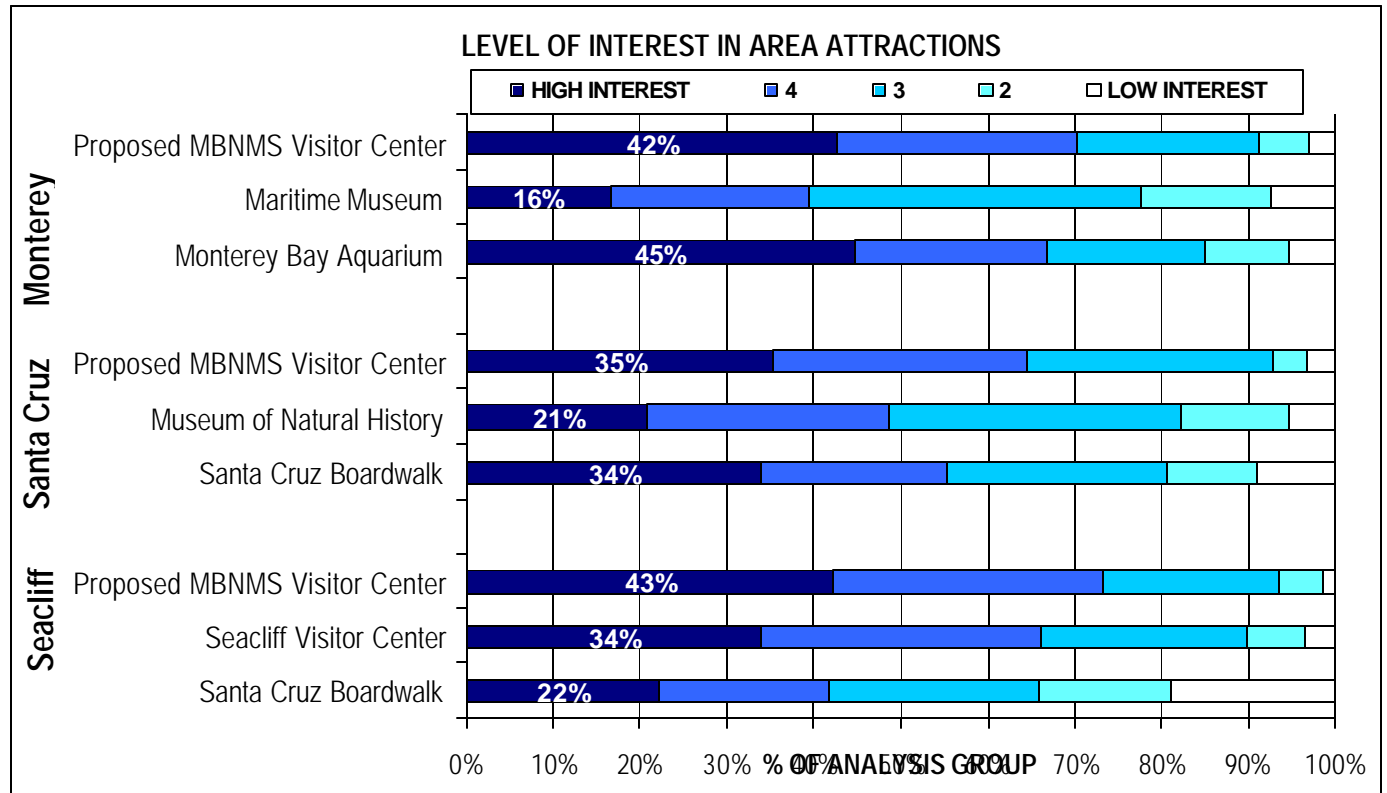


Figure 8: Comparative Level of Interest

Market Area Demographics

AMS has completed an analysis of market areas utilizing geographies defined in a NOAA report titled *Market Analysis and Interpretive Strategy for the NOAA National Marine Sanctuary System* completed in April 2001. Updated 2000 census data has been utilized for the analysis. The market areas are defined as follows:

- “Gateway Cities” - 5-mile radii around the cities of Santa Cruz, Aptos and Monterey
- “Proximate Metro Area” - Santa Cruz & Monterey Counties
- “Regional Catchment Area” - 16 counties around the Monterey Bay and San Francisco region

Gateway Cities Demographic Summary

SUMMARY OF KEY DEMOGRAPHICS			
Variable	Santa Cruz 5-Mi	Aptos 5-Mi	Monterey 5-Mi
2001 Population	111,215	69,337	93,634
Median Age	36.8	39.5	39.4
% Generation Y (5-17 yrs)	15.0%	16.1%	14.9%
% Generation X (18-34 yrs)	26.0%	19.9%	22.2%
% Baby Boomers (35-59 yrs)	39.2%	41.3%	35.7%
% Mature (60+ Yrs)	14.4%	17.0%	21.3%
Median Household Income	\$59,326	\$67,835	\$55,144
% over \$75,000	37.9%	44.5%	31.1%
% with College Degree	32.2%	32.3%	34.6%
Households with Children	28.5%	29.8%	27.9%
% Black	1.6%	1.1%	5.1%
% Asian	5.3%	3.8%	8.8%
% Hispanic (all races)	16.3%	13.2%	17.7%

Figure 9: Gateway Cities
Demographics

Proximate Metro Area Demographic Summary

SUMMARY OF KEY DEMOGRAPHICS			
Variable	Proximate Metro Area	California	USA
2001 Population	666,308	34,199,404	284,002,368
Median Age	34.1	34.8	36.1
% Generation Y (5-17 yrs)	19.4%	19.0%	18.4%
% Generation X (18-34 yrs)	24.1%	23.6%	23.0%
% Baby Boomers (35-59 yrs)	35.1%	35.0%	34.5%
% Mature (60+ Yrs)	13.6%	14.7%	17.2%
Median Household Income	\$58,659	\$50,187	\$45,417
% over \$75,000	35.9%	30.4%	25.2%
% with College Degree	24.9%	23.4%	20.3%
Households with Children	38.9%	37.6%	36.5%
% Black	2.9%	7.0%	12.6%
% Asian	6.3%	12.2%	4.2%
% Hispanic (all races)	39.6%	32.7%	12.7%

Figure 10: Proximate Metro Area
Demographics

Regional Catchment Area Demographic Summary

SUMMARY OF KEY DEMOGRAPHICS			
Variable	Regional Catchment	California	USA
2001 Population	9,197,758	34,199,404	284,002,368
Median Age	36.7	34.8	36.1
% Generation Y (5-17 yrs)	17.6%	19.0%	18.4%
% Generation X (18-34 yrs)	22.7%	23.6%	23.0%
% Baby Boomers (35-59 yrs)	37.2%	35.0%	34.5%
% Mature (60+ Yrs)	15.7%	14.7%	17.2%
Median Household Income	\$62,332	\$50,187	\$45,417
% over \$75,000	39.9%	30.4%	25.2%
% with College Degree	29.0%	23.4%	20.3%
Households with Children	34.1%	37.6%	36.5%
% Black	7.6%	7.0%	12.6%
% Asian	18.0%	12.2%	4.2%
% Hispanic (all races)	20.6%	32.7%	12.7%

Figure 11: Regional Catchment Area Demographics

Income and education levels are generally key indicators of museum and cultural attraction attendance. High income and education levels in the proximate metro area and regional catchment area indicate a market area with strong attendance potential.

The data also indicate nearly 40% of households in the Proximate Metro Area include children living in the home, and 34% in the Regional Catchment Area. This suggests that the Visitor Center should make efforts to appeal to the family market and should be “family-friendly” in its design and programming.

There are also a significant number of Hispanic, Black and Asian households in the market areas. In the Proximate Metro Area nearly 40% of the population is Hispanic. Special effort should be made to program to the Hispanic community in the market area and the facility should include multi-lingual signage and exhibits and bi-lingual tours. Overall, the market area for the Visitor Center is one of the most ethnically and racially diverse in California. Therefore, it is important for the facility to be designed to be comfortable and accessible for people of all ethnicities and cultural backgrounds.

A detailed analysis of the demographics can be found in the appendix.

Comparable Visitor Centers

AMS has conducted research on eleven comparable interpretive centers. This research is detailed in the appendix section. Attendance data from these centers

indicates that facilities similar in nature to the proposed Visitor Center attract less than 1% up to 37% of visitors in the given area. On average, interpretive facilities appear to attract approximately 11% of area visitors. The chart below summarizes the findings.

Name	Mission	Center Square Feet	Area Visitation	School Visitation	Total Visitation	% Visitation
<i>Environmental Discovery Center, Santa Rosa, CA</i>	...learn value of environmental stewardship, habitat restoration, responsible use of Sonoma County's natural resources	2,000	3,000,000	5,000	11,000	0.37%
<i>SF National Maritime Historical Park, Maritime Museum, San Francisco, CA</i>	Education about SF maritime history	7,000	13,000,000	24,000	232,000	1.78%
<i>SF Bay Model, Sausalito, CA</i>	Education about SF Bay and Army Corp of Engineers	1 1/2 acre	3,000,000	60,000	150,000	5.00%
<i>Farallones Marine Sanct Visitor Center, San Francisco, CA</i>	Education about Gulf of the Farrallons National Marine Sanctuary	800	500,000		40,000	8.00%
<i>Sea Center at Stearns Wharf, Santa Barbara, CA</i>	Understand marine and island environments; scientific discovery; inspire kids to become scientists	7,000	1,000,000	15,000	150,000	15.00%
<i>Channel Islands National Park Visitor Center, Ventura, CA</i>	Preserve/protect/interpret cultural values/ecosystems of Channel Isles	8,000	3,000,000	19,700	380,000	12.67%
<i>Point Reyes National Seashore, Bear Valley Visitor Center, Pt Reyes, CA</i>		7,200	2,500,000	4,000	480,000	19.20%
<i>Mt. Rainier National Park, Jackson Visitor Center, Longmire, WA</i>	Facilitate connection between visitors needs and conservation of the natural resources; customer service; safety in park	40,000	2,000,000	2,500	380,000	19.00%
<i>Elkhorn Slough, Moss Landing, CA</i>	To inspire conservation of the Elkhorn Slough watershed and similar coastal habitats	1,300	2,000,000	10,000	50,000	2.50%
<i>Columbia River Maritime Museum, Astoria, OR</i>	Preserve maritime history of Pacific Northwest	40,000	350,000	3,000	130,000	37.14%
<i>Peter & Mary Muth Interpretive Center, Upper Newport Bay, Newport Beach, CA</i>	To promote and support the protection and preservation of California Coastal Wetlands through environmental education	10,000	3,000,000	13,000	20,000	0.67%
		Average	Average	Average	Average	Average
		9,163	3,031,818	15,620	183,909	11.03%

Figure 12: Summary of Comparable Facilities Attendance Data

Visitation Estimate

Based on the data collected, it is AMS's conclusion that, due to the strong interest level and favorable demographics in the region, the MBNMS Visitor Center would likely attract approximately 10% of the existing visitors to each of the three general locations (Santa Cruz, Seacliff and Monterey).

The estimate is made for a base stable year of operations; the third year after the center opens after the initial "honeymoon period" and operations stabilize. During the first two years, attendance can be expected to be as much as 25% higher than the base year.

Once the Visitor Center opens, factors such as specific location, marketing and partnerships will greatly impact actual visitation. It should also be assumed, based on visitation patterns at area attractions, that one half to three-quarters of visits to the center would occur during Summer months.

Visitation Estimate				
Visitor Market	Area Visitation	Low Range	Medium Range	High Range
		5.0%	10.0%	15.0%
Santa Cruz	3,500,000	175,000	350,000	525,000
Seacliff	1,000,000	50,000	100,000	150,000
Monterey	4,000,000	200,000	400,000	600,000

Figure 13: Visitation Estimate

Monterey and Santa Cruz "Area Visitation" numbers in the chart above are based on data collected by the Convention and Visitor Bureaus in each City as well as the Monterey Bay Aquarium and the Santa Cruz Beach Boardwalk. The Santa Cruz Boardwalk claims approximately 3.5 million visitors each year. The Monterey CVB estimates that approximately 4 million people visit the Cannery Row and Fisherman's Wharf area each year. The Aquarium counts approximately 2 million admissions per year, affirming local survey data that indicate 50% of all Monterey visitors attend the Aquarium.

For Seacliff, the number of paid admissions to the State Beach (including campsite users) is approximately one million. State Park officials estimate that actual visitation is significantly higher due to a number of access points where visitors do not pass through an admission gate. However, no official visitor count has ever been conducted. Certain Seacliff residents dispute the State's count and believe the actual number to be less than 500,000 based on their own informal counting. The consultants have elected to use one million for the purposes of this study, as it is the only "defensible" visitor count for the location.

In keeping with the vision expressed by MBNMS for the Visitor Center, AMS has projected visits to the center by area school groups participating in structured educational programs. The estimate considers the total number of children ages 5 to 17 in the Regional Catchment Area and then estimates low, medium and high percentages of those children who would attend programs at the MBNMS Visitor Center. Data from comparable facilities indicates that, on average, a Visitor Center of the nature envisioned would serve approximately 15,000 students annually. The area population data suggests that the MBNMS Visitor Center could achieve the benchmark number of approximately 15,000 by serving 1% of the students living in the Regional Catchment Area. Within the Proximate Metro area (Santa Cruz and Monterey Counties) there are roughly 130,000 children ages five to 17. The Visitor Center would need to serve approximately 12% of this population to attain participation of 15,000 students.

Student Visitation Estimate				
	Student Population	Low Range	Medium Range	High Range
Students (age 5 - 17)		0.5%	1.0%	1.5%
Regional Catchment Area	1,618,805	8,094	16,188	24,282

Figure 14: Student Visitation Estimate

Site Evaluation

In the RFP issued by the MBNMS for this study, three sites were mentioned as possible opportunities: Heritage Harbor in Monterey, the Depot Site in Santa Cruz and Seacliff State Beach. During the background research phase of the study, AMS explored numerous other possible sites in Santa Cruz and Monterey Counties, in addition to those mentioned above. Most of this research was completed during the key informant interview processes. In the interviews, informants were asked about their ideas for possible sites as well as their opinions regarding options identified by Sanctuary staff.

From this, a number of sites were identified and preliminarily assessed against key criteria established by MBNMS staff and the consultants. These criteria are:

1. Ability to secure use of site for minimal or no cost
2. Ability of site to contain a minimum of 5,000 square feet of program space
3. View of the ocean
4. Presence of significant existing visitor traffic (tourist and/or local)
5. Convenient and safe access to the ocean and/or coastal features (such as tide pools)

If sites adequately met these criteria, they were added to the list of viable options for more in-depth evaluation. Sites that were suggested but that DID NOT adequately meet the five key criteria were:

- Porter Sesnon site near Seacliff Village
 - No existing visitor traffic
 - Greatly obstructed view
- Por Claires site, Seacliff Village
 - No view or access to ocean
 - Site only available at market price

- The McGregor site, Seacliff Village
 - No view or access to ocean
 - Site being considered for possible community park
- New Brighton State Beach shuttle parking area
 - No view or access to ocean
 - Very little existing visitor traffic
- Twin Lakes State Park, Santa Cruz
 - Portion of site available for Visitor Center has no existing visitor traffic and limited view and access to ocean.
 - Destruction of natural habitat area necessary to accommodate Visitor Center
- Santa Cruz Harbor
 - No currently available property
- UCSC Long Marine Lab campus
 - Limited number of visitors
 - Site is removed from Santa Cruz attractions and amenities
 - Visitor Center would “compete” directly with the Seymour Center for visitors
 - Access to ocean is hazardous
- The Rogue Building near Wharf #2, Monterey
 - Building not currently available
- Industrial building located on Wharf #2, Monterey
 - Building not currently available
- Monterey Maritime Museum (explored sharing space)
 - No currently available space
- Monterey Aquarium (explored sharing space)
 - No currently available space
- La Porte building on Cannery Row, Monterey
 - No currently available space
- Oceanview Plaza development on Cannery Row, Monterey
 - No presently available space
- Stillwell Hall, Fort Ord
 - No existing visitor traffic
 - Proposed new site would have limited access and view of ocean
 - Extremely high cost to save, move and restore the building

- 8 acre site near the main entrance to Fort Ord
 - Limited access and view of ocean
 - No existing visitor traffic
- Marina State Beach, Marina
 - Hazardous access to ocean
- Cannery Row Square, Monterey
 - Proximity to Aquarium may limit appeal of a relatively small Visitor Center at this location
 - MBNMS would likely pay market price for lease or sale of building
- Historic Sardine Cannery, Monterey
 - Building not presently available
 - Obstructed view of ocean
 - Limited on-site parking (8 stalls)
 - Lacks visibility from Cannery Row or other main thoroughfares
- Heritage Harbor, Monterey
 - Owner indicates need to lease space as soon as possible at market rates
 - Access and visibility challenges

Four sites were deemed sufficiently viable to be investigated in more detail during Phase II of the feasibility study. The four sites are described later in this section.

Intercept Survey

To test the public's interest in visiting an MBNMS Visitor Center at the three potential areas (Monterey, Seacliff & Santa Cruz), AMS conducted intercept surveys at each location. The specific sites were:

- The Santa Cruz Municipal Wharf
- Seacliff State Beach
- Monterey Cannery Row and Fisherman's Wharf

The surveys were conducted over a three-day period in August 2002⁴. The primary purpose of the survey was to determine visitors' interest in visiting a Visitor Center and what kinds of programs and activities might appeal to them. The survey results have been used to assist with estimating potential visitation at the alternate sites. Details of this aspect of the results are discussed in the

⁴ The survey was conducted August 23rd – 25th and was administered by Audience Insight, LLC, a professional market research firm affiliated with AMS Planning & Research.

Visitation Estimate section of this report and in the appendix. The survey revealed a number of distinct differences in the composition and interest of visitors to the three areas, which are explained below.

Visitation

According to local tourism industry sources and City and State officials, the three locations each attract a high number of visitors annually (see Figure 15 on following page).

Location	Monterey	Santa Cruz Beach Boardwalk	Seacliff State Beach
Estimated Visitation	4 million	3.5 million	1 million ⁵

Figure 15: Estimated Visitation

At all three locations the high season for visitors is during the summer months, especially between July 4th and mid-August. Tourism in Monterey is somewhat more consistent year-round due to the number of conventions and conferences held there throughout the year. While the past year has seen some decline in this activity in Monterey, the City has a strong history as a popular national and international destination as well as attracting many day-return Bay Area residents.

In Santa Cruz, during off-season months, many tourist-oriented businesses significantly reduce their operations. The City and County of Santa Cruz have long been contemplating how to expand their off-season visitation and several plans have been developed over the years.

At Seacliff State Beach visitation is very seasonal and draws mostly local and regional residents.

Visitors

The intercept survey collected data about where respondents live, how long they were in the area, what activities they had done and were planning to do.

Regarding the sources of visitors to each area, the data confirm anecdotal evidence that a higher percentage of visitors to Seacliff are local (from Monterey and Santa Cruz Counties) compared to the Monterey and Santa Cruz areas.

⁵ State Park data indicates that the number of paid admission to Seacliff State Beach are approximately one million. Seacliff residents dispute this number and have conducted their own unofficial count and estimate the number to be less than 500,000. The consultants have elected to use the one million estimate as it is the only "defensible" number available.

Location	Monterey	Santa Cruz	Seacliff State Beach
% From Monterey Bay area	17%	17%	30%

Figure 16: Percent of Local Respondents

As might be expected, a higher percentage of Seacliff visitors plan their visits on a “spur of the moment” basis and visit for just the day. Visitors to the Santa Cruz location also tend to plan their trips at the last minute, whereas Monterey visitors plan further in advance.

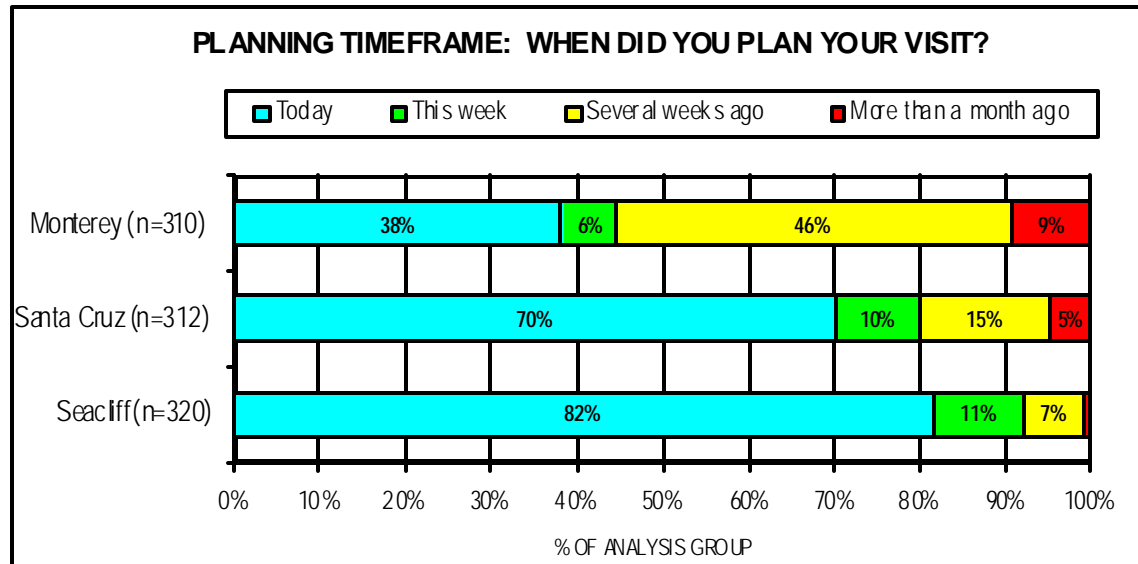


Figure 17: Planning Timeframe of Survey Respondents

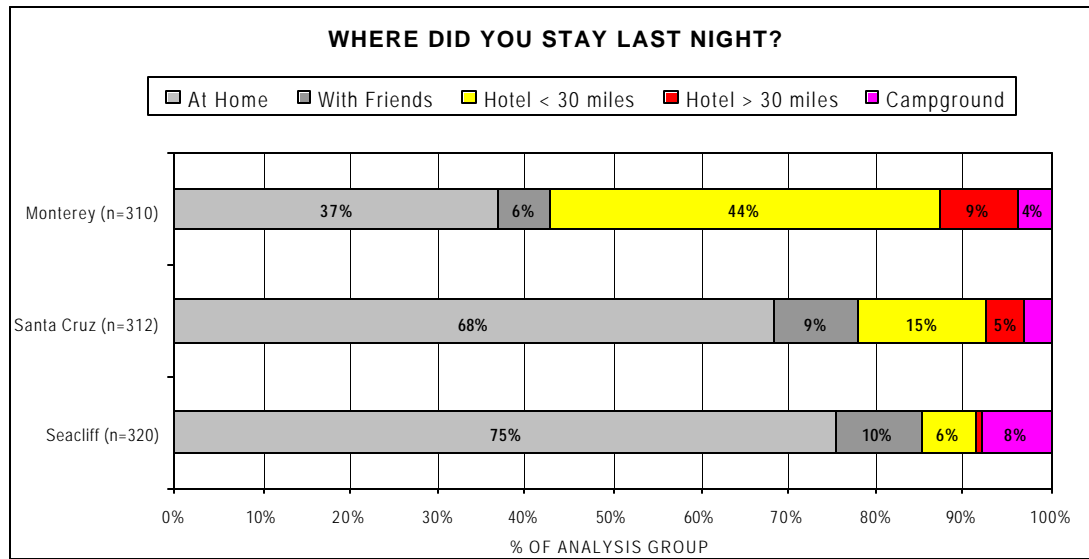


Figure 18: Overnight Visitors

As Figure 18 shows, over 60% of Monterey respondents stayed in accommodations other than their own homes while visiting the area. Monterey respondents also stay for a longer time than respondents from the other two sites. Nearly 55% of Monterey respondents indicated staying overnight in the area.

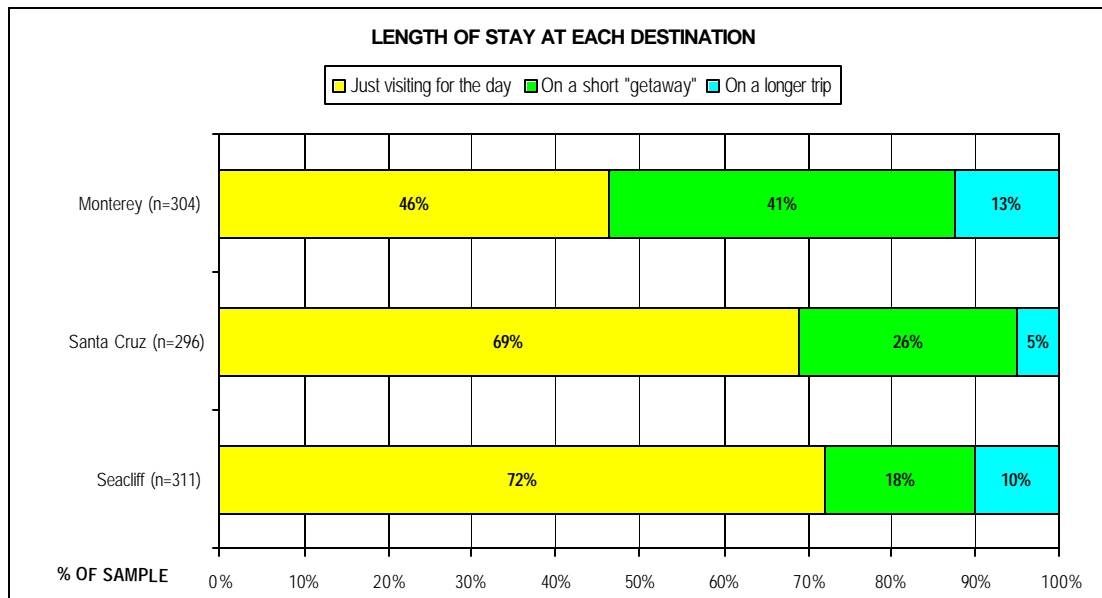


Figure 19: Length of Stay

The survey data show that all three locations have high percentages of repeat visitors with Santa Cruz and Seacliff slightly higher.

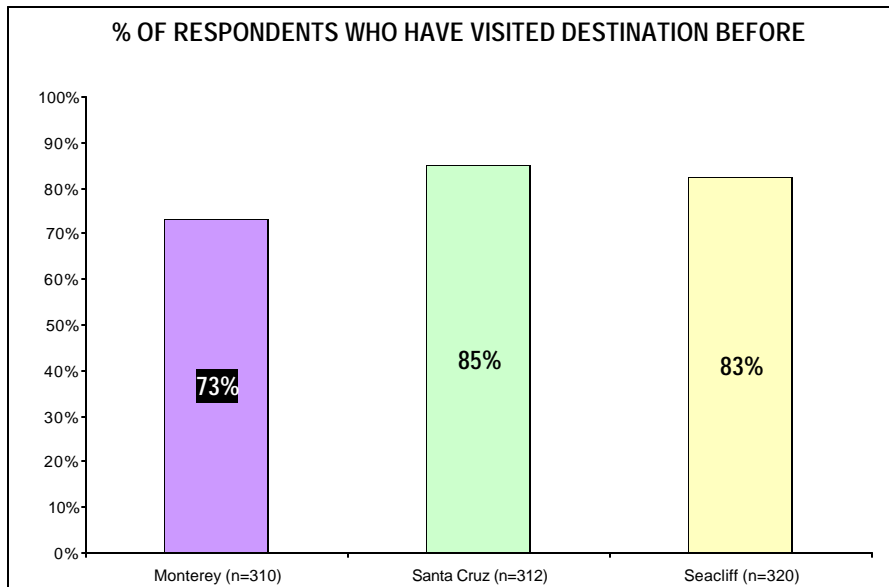


Figure 20: Repeat Visitors

The intercept survey also asked respondents about the number of people in their travel party. As the chart below indicates, larger travel parties were found at Seacliff than the other two sites and Monterey visitors traveled in smaller sized groups. By observation, there were several large parties such as family reunions, birthday parties and church-group events occurring at Seacliff during the time of the survey. For this reason, the chart also shows the data when groups with over 10 people are removed from the data set.

Party Size	Full Sample		Without Groups 10+	
	Mean	Median	Mean	Median
Seacliff	7.4	4.0	3.9	4.0
Santacruz	4.2	4.0	4.0	4.0
Monterey	3.1	2.0	2.7	2.0

Figure 21: Party Size

The variation between party sizes at the three locations implies that the Santa Cruz and Seacliff sites may have more families visiting with children. The analysis of travel party composition reveals that this is the case.

Children Under 16 in Party	Full Sample	
	Mean	Median
Seacliff	4.0	3.0
Santa Cruz	2.5	2.0
Monterey	1.9	2.0

Figure 22: Children Under 16 in Travel Party

Demographic data collected from respondents also shows that a higher number of respondents reporting children living in their homes visit the two Santa Cruz County sites than Monterey.

Presence of Children in the HH	Seacliff	Santa Cruz	Monterey
% with Any Children	55%	54%	32%

Figure 23: Presence of Children in the House Hold

Summary and Conclusions

The intercept survey points out a number of differences in the visitor profile among the three locations. These differences do not necessarily imply that one site is “better” than the others. The data suggest that the programs and activities of a Visitor Center would need to be different in each location, responding to factors such as the presence of children in the visiting group, potential visitation numbers, the knowledge that the visitors bring with them and the familiarity of the visitors with the area.

The major differences in the locations can be summarized as follows:

- Visitors to Seacliff State Beach comprised a significantly higher percentage of local residents (Monterey Bay area) than the other two locations
- Monterey visitors stay in the area for longer periods of time than Santa Cruz and Seacliff visitors and plan their trips further in advance
- The Santa Cruz County sites draw higher numbers of families with children
- Repeat visitation is high at all three sites, but more so at the two Santa Cruz County sites.

A more detailed analysis of the survey can be found in the appendix.

Potential Sites

The following specific sites are currently under consideration and will be evaluated further in Phase II of the feasibility study.

Santa Cruz Sites

- **The Fun Spot:** The site being proposed by the City of Santa Cruz' planning department, redevelopment agency and city council is known as the Fun Spot, located across Beach Street from the Municipal Wharf. The City owns the site. Representatives from the City indicated to AMS that the site would be made available at little or no cost. The City is currently planning to relocate its Museum of Natural History to the adjacent Depot Site and envisions close collaboration between the museum and the Sanctuary Visitor Center. It has been discussed that perhaps certain aspects of marketing, facility operations and programming could be shared between the Visitor Center and Museum and that visitors would be encouraged to visit between the two facilities. At this stage, the City does not anticipate assisting with construction or capital funding.
 - Fun Spot site is approx. 15,000 square feet.
 - Site is bisected by active railroad tracks.
 - Building must not block views of historic railroad trestle and historic homes on hill behind site.
 - Free use of land, but no existing building.
 - 3.5 million visitors per year attend the nearby Beach Boardwalk and Municipal Wharf.
 - Heavy car and pedestrian traffic.
 - Ocean view is unobstructed and public beach access is approximately 50 yards away.

Unknowns:

- Level of difficulty in configuring a building on the site
- Details of partnerships and collaborative opportunities with the City of Santa Cruz and the Natural History Museum
- **The Beach Boardwalk:** Within the same general vicinity as the Fun Spot is the world famous Santa Cruz Beach Boardwalk, which attracts approximately 3.5 million visitors annually. Representatives from the Seaside Company (which owns the Boardwalk) indicated they would be interested in discussing a partnership with MBNMS to utilize available space within the Boardwalk as a Visitor Center.
 - 6,500 square feet available for dedicated MBNMS space on upper floor of the arcade building.

- Possible regular use of former Coconut Grove ballroom and other assembly spaces for programs.
- Lease/partnership/sponsorship arrangement possible with Seaside Co.
- Over 3 million people visit the Boardwalk annually.
- Beachfront site allows the best possible ocean view and access to the resource.

Unknowns:

- Details of sponsorship/partnership with Seaside Company
- Terms of lease for space
- Ability of available square footage to accommodate envisioned Visitor Center activities and exhibits.



Figure 24: Santa Cruz Sites

Seacliff State Beach

- **Seacliff State Beach:** State Parks officials have proposed the three-acre area on the bluff-top at Seacliff State Beach as a potential site for the Visitor Center. The site currently contains a maintenance yard, paved parking area and an unpaved overflow parking area. California State Parks would provide the site at no cost and could become a partner in development and operations. A number of local residents have signed a petition in opposition to development on the bluff. (See *Background Research* section for additional information).
 - Approximately three acres
 - State Park is relocating maintenance yard to alternate location off-site.
 - Use of site offered at no cost by State Parks, but no existing building.
 - Visitation estimated to be in the range of one million per year.
 - Exceptional ocean view.
 - Easy beach access via auto or stairs down bluff-side.

Unknowns:

- Ability of project opponents to accept a Visitor Center.
- Optimum configuration of the site to preserve open space and views.
- Level of participation by State Park.



Figure 25: Seacliff State Beach

Monterey Sites

- **Monterey Historic Train Depot:** The Depot building is located between Del Monte Avenue and Fisherman's Wharf in Monterey and is owned by the City of Monterey. Historically, this building had a two-story addition, which, according to City planning officials, could be rebuilt if more space is required. The historic depot is not currently occupied and appears to be in reasonably good condition. The view of the Bay from this building is across a busy parking lot.
 - Existing building estimated to be approximately 3,600 square feet.
 - City officials would envision a \$1 per year lease arrangement pending further negotiation and City Council approval.
 - Annual visitation to the Monterey Cannery Row and Fisherman's Wharf area is estimated at approximately 4 million.
 - View to ocean is across large parking lot.
 - Beach access is across the parking lot.

Unknowns

- Interest level of City Council⁶
- Effect proximity of Monterey Bay Aquarium would have on visitation
- Allowable square footage of two story addition

⁶ At the time of this writing only senior city staff and the Mayor have had input regarding this site. There has been no official reaction from City Council. City staff intends to bring the matter before council on March 18th, 2003.

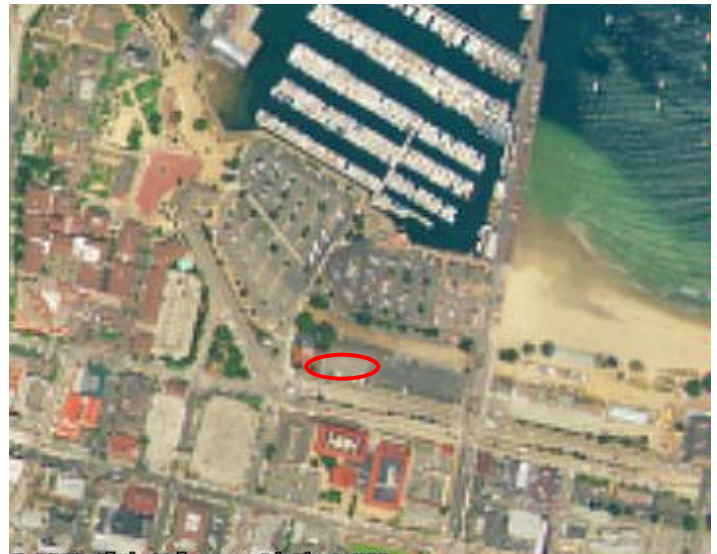
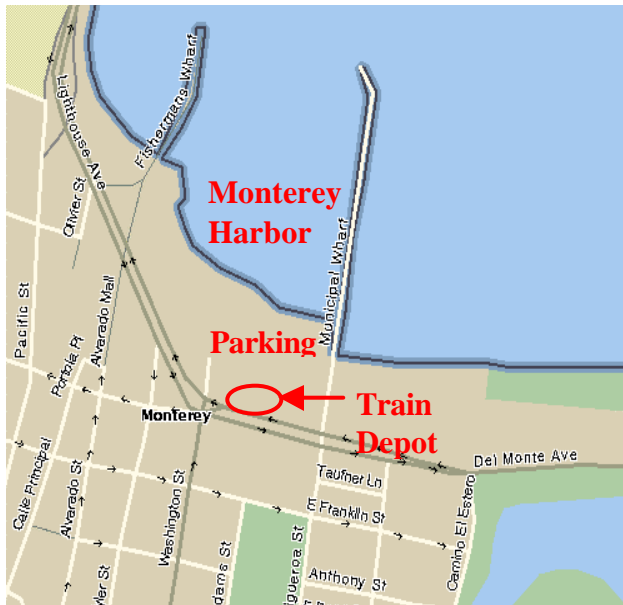


Figure 26: Monterey Historic Train Depot Site